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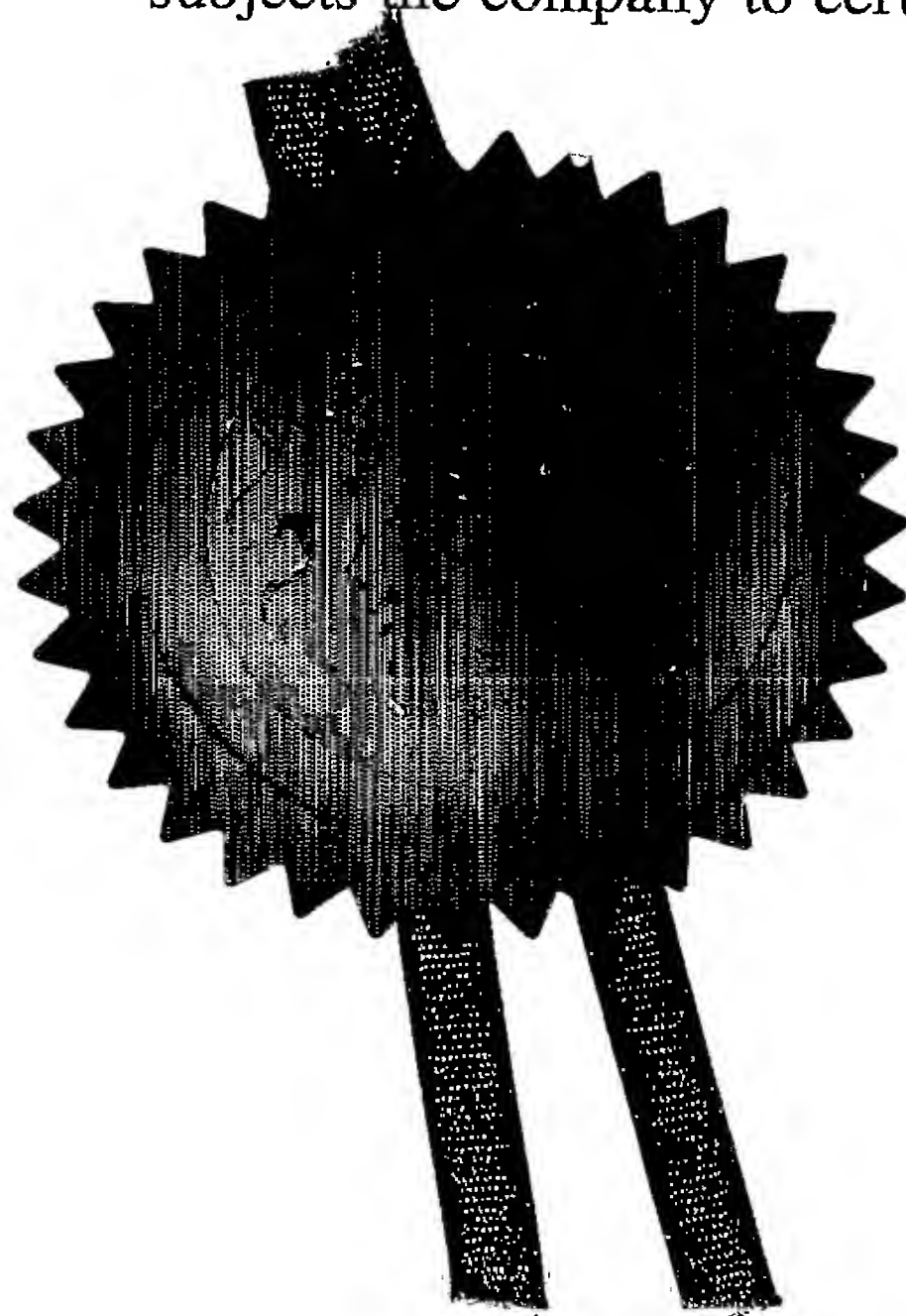
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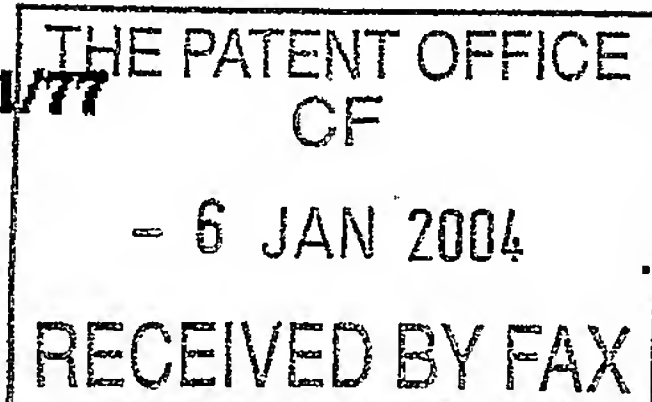
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2.	Patent application number *(The Patent Office will fill in this part)*	**0400148.3**	- 6 JAN 2004

3.	Full name, address and postcode of the or of each applicant *(underline all surnames)*	**Calico Jack Ltd Argyll House Marketgait DUNDEE DD1 1QP**
	Patents ADP number *(if you know it)*	8718546001
	If the applicant is a corporate body, give the country/state of its incorporation	**UK**

4.	Title of the invention	**Dynamic modularity in flexible, persistent agents**

5.	Name of your agent *(if you have one)*	**Kennedys Patent Agency Limited Floor 5, Queens House 29 St Vincent Place Glasgow G1 2DT**
	"Address for service" in the United Kingdom to which all correspondence should be sent *(including the postcode)*	
	Patents ADP number *(if you know it)*	08058240002

		Country	Priority application number *(if you know it)*	Date of filing *(day / month / year)*
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12. Name and daytime telephone number of   **Jim Adams**   **Tel: 0141 226 6826**
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1

1   **<u>Dynamic Modularity in Flexible, Persistent Agents</u>**

2

3   The present invention relates to the dynamic deployment

4   of functionality in software agents, in particular, a

5   dynamic modular architecture for the agent that supports

6   deployment of functionality that is not anticipated when

7   the agent is instantiated.

8

9   Agents represent a means of representing a user in the

10 electronic world, bringing together all the various

11 functions that the user wants to perform in that

12 electronic world, including:

13 • the transient, anonymous presence of an online search;

14 • persistent occasional presence of online shopping at a

15   particular store;

16 • persistent passive presence of directed marking;

17 • persistent though temporary realtime presence in an

18   online game;

19 and many more.

20

21 US Patent Application Publication Number US2002062334 to

22 Hewlett Packard Company, CO, USA, entitled "Dynamic

23 agents for dynamic service provision" teaches of dynamic

2

1   agents and a dynamic agent infrastructure that supports
2   dynamic behaviour modification of agents. Dynamic agents
3   carry out application specific actions, which can be
4   loaded and modified on the fly. One key limitation of
5   the approach presented is that it refers to the dynamic
6   deployment of agent behaviour — but for the system to
7   work as described, that dynamically deployed behaviour
8   must be predefined (so that individual programs can know
9   what to expect from others). The term 'dynamic' is thus
10 misleading. The work could better be described as the
11 dynamic deployment of statically defined behaviour. One
12 problem presented by this aspect of US2002062334 is that
13 software engineering in the large, and in particular,
14 multi-party and multi-site development is made much
15 harder by the need to conform to a rigid prespecified
16 sets of functionality. It would be advantageous for new
17 functionality to be definable dynamically, so that
18 separate teams can worker in greater isolation, thereby
19 simplifying problem decomposition.
20
21 US2002062334 describes dynamic functionality in an agent.
22 It does not decouple functionality and therefore does not
23 support functionality that is not at least defined at
24 agent start-up. It discloses that the dynamic agent's
25 modifiable portion includes its data, knowledge and
26 action programs, which determines its application
27 specific capabilities. Thus the generic, fixed portion of
28 a dynamic agent, together with its application programs,
29 acts as an autonomous problem solver. This means that
30 generic capabilities (such as reasoning) are fixed at the
31 point of startup of an agent. For agents that persist
32 over a long period (months and years, rather than hours

3

1   or days) this means that it is impossible to introduce
2   new, generic capabilities as they become available.
3
4   Finally, the US2002062334 does not explain how existing
5   functionality might be replaced. Crucially, if demands
6   are made of a carried action, and those demands pile up,
7   and the carried action is then replaced, there is no way
8   of coordinating the rescheduling of those demands for the
9   new carried action. By having a specific component
10   responsible for handover during update, it would become
11   possible to queue these demands until the new
12   functionality is in a position to handle them.
13
14   Agents represent individuals, and typically persist over
15   long periods. It is thus a very real problem that adding
16   new generic functionality and upgrading existing
17   functionality in deployed systems should be prohibited.
18   As a consequence, it would be advantageous to implement a
19   method by which even the core, generic functionality can
20   be replaced. A portion of the data of an agent may be
21   retained, at the discretion of the update mechanism, to
22   maintain coherence (so, for example, the beliefs of an
23   agent may persist through an update of core
24   functionality). This would allow upgrading of deployed
25   agents through a straightforward, scalable mechanism.
26
27   US2002062334 discloses that when multiple actions are
28   carried by the same dynamic agent, they can exchange
29   information through the object store of that dynamic
30   agent. A first problem with this is that for a carried
31   action to be able to use data from another module, it
32   must be able to anticipate the availability and internal
33   structure of that data. That is, it must have knowledge

4

1 of the "interface" provided by that action. So for any
2 two actions that might need to interact, they must (a)
3 know that the other action is carried, (b) know enough
4 about that action to know what data it can provide and in
5 what format. In this way, any 'old' carried action will
6 be unable to exploit the functionality developed in 'new'
7 carried actions that was unanticipated at the time of the
8 development of the 'old' carried action. This is a clear
9 theoretical problem that translates into a large
10 practical problem in situations where agent systems are
11 deployed on a wide basis, particularly if they are
12 persistent, and subject to rigorous quality of service
13 requirements (such that they can't simply be 'switched
14 off' for an upgrade). A second problem, in a similar
15 vein, is that old actions cannot know of the methods
16 (i.e. published procedures) of a newer carried action. It
17 is presumably for this reason, coupled with the fact that
18 it is much more difficult to design all possible method
19 interfaces on a system-wide basis at the outset, than it
20 is data interfaces, that means that the disclosed system
21 does not support method calls between carried actions.
22 This reduces the potential for synergistic interplay
23 between carried actions, and can lead to requiring
24 redundancy (reimplementing identical functionality in
25 different carried actions). The problem is thus that one
26 carried action cannot make a call upon the abilities of
27 another. This violates key principles of modern
28 programming practice aimed at code reuse and adaptation,
29 by forcing modules to implement all the functionality
30 that they will need, rather than utilising functionality
31 they may know is already available within other modules
32 in the agent. Agentative representation in mobile
33 services represent a domain in which persistency is

6

1   Preferably said method means performs said function

2   responsive to said request.

3

4   Preferably said request from a requesting module

5   comprises a label specifying a function and said method

6   means in said dockable module corresponds to the

7   specified function.

8

9   Preferably said intermodule communication means comprises

10 a store of labels and associated modules.

11

12 Preferably said store of labels and associated modules is

13 a table.

14

15 Optionally said method means performs the function of

16 docking said dockable module with said agent.

17

18 Optionally said method means performs the function of

19 registering a label with said intermodule communication

20 means, the label specifying a function supported by said

21 dockable module.

22

23 Optionally said method means performs the function of

24 undocking said dockable module from an agent.

25

26 Optionally said method means performs the function of

27 requesting the discarding of a label from the intermodule

28 communication means, the label specifying a function

29 supported by said dockable module.

30

31 Optionally said method means performs the function of

32 updating said dockable module within said agent.

33

7

1 According to a second aspect of the present invention,
2 there is provided a method of deployment a module in an
3 agent comprising the steps of:

4   • receiving a request for deployment of said module;
5   • maintaining registration information relating to a
6   function supported by said module; and
7   • invoking said function.
8

9 Preferably said step of maintaining registration
10 information comprises maintaining a store of labels and
11 associated modules, each label specifying a function
12 supported by a module.
13

14 Preferably said store of labels and associated modules is
15 a table.
16

17 Preferably said step of maintaining registration
18 information comprises the step of registering a label
19 specifying a function supported by said module.
20 This type of deployment is docking.
21

22 Alternatively said module is a docked module and said
23 step of maintaining registration information comprises
24 the step of unregistering a label specifying a function
25 supported by said docked module.
26 This type of deployment is undocking.
27

28 Alternatively said module is a replacement module and
29 said step of maintaining registration information
30 comprises the steps of:

31   • unregistering a label specifying a function
32   supported by a docked module from said agent; and

8

1   • registering a label specifying a function

2   supported by said replacement module with said

3   agent

4   and said method further comprises the steps of:

5   • storing information related to the state of said

6   docked module; and

7   • instantiating said replacement module using said

8   stored information.

9   This type of deployment is updating.

10

11 Optionally, said step of maintaining registration

12 information further comprises the step of queuing calls

13 to the docked modules' registered labels, prior to the

14 step of registering a label specifying a function

15 supported by said replacement module.

16

17 According to a third aspect of the current invention said

18 function supported by said module according to the second

19 aspect is the method of deployment of said module

20 according to the second aspect.

21

22 In order to provide a better understanding of the present

23 invention, an embodiment will now be described by way of

24 example only and with reference to the accompanying

25 Figures, in which:

26

27 Figure 1 illustrates, in schematic form, an agent and a

28 module in accordance with a preferred embodiment of the

29 present invention;

30

31 Figure 2 illustrates, in schematic form, an overview of

32 agentative representation in a multi-service environment;

33

1   Figure 3 illustrates, in schematic form, the process by

2   which a label is resolved in accordance with a preferred

3   embodiment of the present invention;

4

5   Figure 4 illustrates, in schematic form, module docking

6   in accordance with the present invention;

7

8   Figure 5 illustrates, in schematic form, module updating

9   in accordance with the present invention;

10

11 The inventions are an architecture and methods for

12 dynamic deployment of modules in a software agent.

13

14 Although the embodiments of the invention described with

15 reference to the drawings comprise computer apparatus and

16 processes performed in computer apparatus, the invention

17 also extends to computer programs, particularly computer

18 programs on or in a carrier, adapted for putting the

19 invention into practice. The program may be in the form

20 of source code, object code, a code of intermediate

21 source and object code such as in partially compiled form

22 suitable for use in the implementation of the processes

23 according to the invention. The carrier may be any

24 entity or device capable of carrying the program.

25

26 For example, the carrier may comprise a storage medium,

27 such as ROM, for example a CD ROM or a semiconductor ROM,

28 or a magnetic recording medium, for example, floppy disc

29 or hard disc. Further, the carrier may be a

30 transmissible carrier such as an electrical or optical

31 signal which may be conveyed via electrical or optical

32 cable or by radio or other means.

33

10

1   When the program is embodied in a signal which may be

2   conveyed directly by a cable or other device or means,

3   the carrier may be constituted by such cable or other

4   device or means.

5

6   Alternatively, the carrier may be an integrated circuit

7   in which the program is embedded, the integrated circuit

8   being adapted for performing, or for use in the

9   performance of, the relevant processes.

10

11 With reference to Figure 1, the architecture 100 of an

12 agent according to the present invention is best

13 visualised as including a torus. On the inside of the

14 torus 102, a special module, the core module 104,

15 attaches itself. On the outside of the torus, any number

16 of application specific modules 106, 108 may also become

17 attached. The security and unity of the agent is also

18 conceptually protected by a thin sphere 110 encompassing

19 all the modules. The torus itself coordinates all

20 communication between modules and between modules and

21 core: this is the Inter Module Communication Layer

22 (IMCL).

23

24 The modular architecture is implemented as a class that

25 defines a module, from which specific classes,

26 corresponding to modules with specific functionality, can

27 be derived. A module 112 is shown with its components

28 depicted. The module contains a number of components for

29 implementing functions:

30   1. A docking method 114 that is called when the

31   module is introduced to the agent and that describes

32   the functionality provided by that module;

11

1 2. An undocking method 116 that is called when the

2 module is required to detach itself from the agent

3 and terminate;

4 3. An update method 118 that is called when the

5 module is to be updated with a new version; and

6 4. A message handling method 120 for between-agent

7 communication.

8

9 The docking method of a particular module provides the

10 IMCL with a list of labels. The extensible set of these

11 labels is consistent system-wide, functioning as the

12 definition of the system's programming interface and is

13 maintained centrally by the service provider. A

14 particular module implements methods that match some

15 (typically small) subset of all labels. On docking, a

16 module informs the IMCL which labels it provides

17 functionality for. As each module docks, the IMCL builds

18 a table 122 of labels against which are listed the names

19 of the methods that provide the functionality and the

20 names of the modules implementing those methods.

21

22 In some cases, the labels implemented by a particular

23 newly docking module may already be implemented by

24 methods extant in the agent. So for example functionality

25 f implemented by method x in module m1 may mean that when

26 m1 docks in an agent, it needs to register the label f

27 with the IMCL. But some other method, y, in some other

28 module, m2, that is already docked, may also implement

29 functionality f . Thus the IMCL would list functionality

30 f has being implemented by m2.y.

31

32 In such situations, the IMCL adds the new label and

33 associated method to its table, but also includes a

12

1   priority ranking, applied to both the new and old methods

2   that implement the functionality. This priority is

3   determined on the basis of some algorithm. Recency is a

4   good example, whereby newer methods are always given a

5   higher priority, but there are many such algorithms.

6

7   In addition, a module's docking method calls functions

8   provided by the core's module management. These calls

9   register information about the module with the core,

10   including its name, provenance and labelled

11   functionality. The processes of docking and module

12   updating are described below with reference to Figures 7

13   and 8.

14

15   A user interacts with the electronic world for a host of

16   reasons in a wide variety of domains: entertainment, e-

17   commerce, professional, and so on. The present invention

18   provides a means of bringing together all of these tasks

19   and domains, and providing a single point of contact for

20   the user, and allowing the sharing of user data between

21   these different application domains. This contact is the

22   user's agent, both in the computer-science sense (where

23   agent oriented programming has particular restrictions,

24   techniques and approaches, and places particular demands

25   on software), and also in the intuitive sense of

26   providing services of advocacy and representation. A

27   user's agent is their permanent representative in the

28   electronic world. Ideally, each user has exactly one

29   agent, and a user's agent represents exactly one user (at

30   the very least, such a relationship exists in a given

31   context). The overall picture is as in Figure 2.

32

13

1   With reference to Figure 2, an overview of agentative

2   representation in a multiservice environment is shown.

3   The user 202 connects to their agent 206 at any time via

4   any device (2G phones, multimedia mobile handsets,

5   internet, etc.) in ways that are well known. The user

6   agents 204 which represent users in the virtual world are

7   shown. One user has a single agent 206 representing him

8   or her in all their interactions in the virtual world.

9   The service agents 208 provide specific services to any

10   agents that request them, or that the service agents

11   themselves decide to service. Information exchange

12   between user and service agents can be initiated from

13   either end. Some service agents 210 encapsulate existing

14   legacy services (e.g., databases, Web Services and

15   proprietary data handling systems). Broker agents 212

16   can mediate between a user and service agents. The user

17   agents service agents and broker agents may be provided

18   as a trusted service by a telecommunications operator.

19

20   An agent is a software entity with particular

21   characteristics. We refer here to software processes that

22   are:

23   (i)   persistent (in that they continue to exist for an

24   extended real time period, adapting to a single user

25   over that time);

26   (ii) proactive (in that they include not only reactive

27   behaviour, but also independently determined

28   behaviour);

29   (iii)   communicative (in that they communicate with

30   other agents); and

31   (iv) autonomous (in that they typically cannot be

32   directly modified by outside agencies, but must

33   instead be altered through communciation).

14

1

2   The user can communicate with his agent across

3   heterogeneous networks from a variety of devices,

4   including mobile handsets and internet clients. In

5   addition, however, the framework of the present invention

6   supports the transparent filtering of information

7   according to the device to which it is being sent. Thus

8   the components within an agent that initiate

9   communication with a user need not have any

10 representation of the device type a user is employing.

11 The content of the message is instead dynamically

12 tailored to the user's device (e.g. summary text to an

13 SMS-enabled mobile device, still pictures to a MMS-

14 enabled mobile device, streaming video to broadband

15 internet client platform, etc.).

16

17 The core is responsible for tailoring information to the

18 device that is known to currently be available to the

19 user. Thus, tailoring happens independently of the

20 module calls, so that individual modules do not need to

21 maintain device-specific information.

22

23 This filtering is achieved through a module-independent

24 communication object that is filled in by individual

25 modules when they need to communicate with the user.

26 This object has subparts for different forms of media

27 (text, picture, video, audio, etc.,). A module fills in

28 as many of these subparts as it is able. The core then

29 mediates the sending of that message to the user, by:

30 (i)   identifying which device the user is currently

31   employing (using a combination of historical usage

32   patterns, presence information, and most recent

33   communication data);

17

1   User data (e.g., address; credit card details; age) and

2   user preferences (e.g., policy on releasing credit card

3   details; preference for aisle or window seat on planes;

4   preferred DVD supplier) are stored in a local, private,

5   secure database. Both user data and user preferences are

6   extracted in three ways. First, through an explicit

7   online interface that requests input on date of birth, or

8   supports update to reflect change of address. Second, if

9   the agent recognises information that it needs from the

10 user, it can ask for it directly (e.g. asking a yes/no

11 question by SMS). Third, as the user interacts with

12 services manually, the agent can intercept information

13 either explicitly or implicitly. If the user answers a

14 particular question from a particular online service, the

15 agent may either store that answer for future use, or ask

16 the user explicitly if such storage is appropriate or

17 useful. When acting autonomously, the agent provides

18 information that external service requires (and no more),

19 less anything that the user has placed a restriction on.

20 Thus, for example, when interacting with an online

21 newspaper, the newspaper provider may request user

22 registration, but not demand it. In this case, the agent

23 would provide no user information. Alternatively, when

24 interacting with a book e-tailer, the e-tailer may

25 require personal details including credit card data. If

26 the user has instructed his or her agent not to give out

27 credit card details without confirming it first, the

28 agent would halt interaction with that site until user

29 confirmation was sought and agreed.

30

31 These components could be represented by the steps:

32   1. Agent has goal of interacting with a service

18

1   2. Select required information from the user model
2   (UM) (accesses the UM)
3   3. Check that the user model permits all this
4   information to be freely given (accesses the UM)
5   If so,
6   4. Information given to the service
7   Otherwise
8   5. Process the restriction (either by terminating,
9   or by asking the user, or by performing some
10   other action)
11
12   The core also includes a subsystem responsible for
13   passing messages to, and receiving messages from the
14   user. The user may connect to his or her agent through a
15   number of different channels: using a web browser on a
16   PC, using a rich media mobile device (a Java phone, for
17   example), using a high capacity mobile device (such as
18   one that uses GPRS), or using an older, limited media
19   device (say that can only handle voice and SMS traffic).
20   The core implements labels that handle communication to
21   and from such devices quite transparently: the calling
22   module does not need to specify the different
23   communication types at all.
24
25   The means by which one agent communicates with another is
26   implemented in the core. Rather than supporting only
27   agent-to-agent messages, the architecture is instead
28   built around the idea that it is individual modules
29   within agents that communicate with one another (this is
30   "between agent module-module" or BAMM communication).
31   Thus a module with expertise in buying in a particular e-
32   commerce institution will communicate with a module in
33   another agent that has expertise in selling in that same

22

1   labels with the IMCL and initialise 728 the BAMM handler
2   before ending the process 730.
3
4   The undocking method of a particular module informs the
5   IMCL and the core module management that the
6   functionality provided by the module is terminating, and
7   then kills the module's thread.
8
9   One of the advantages of decoupling of functionality in
10   separate modules is in allowing modules to be added to an
11   agent on-the fly. Such modules need not have
12   functionality that is known before the agent is
13   instantiated, as each module describes its own behaviour
14   and functionality on docking. The same approach can be
15   used to update existing modules with new versions.
16
17   Another, practical, advantage of the approach is that it
18   removes compile time dependencies: a module developer can
19   design, implement and test a module which makes calls to
20   another module that they do not have, or do not have
21   access to, or, indeed, that has not been developed at
22   all. This simplifies many of the problems of software
23   engineering in the large, and of multi-site collaborative
24   development work.
25
26   The core is responsible for the handling of new modules
27   and module updates. It arranges for outgoing requests to
28   be sent for new modules (or for updated versions of
29   existing modules), handles incoming requests for the
30   agent to take on new modules, and handles the process by
31   which a module is added. So, for example, if the user
32   decides to sign up for a new, free service, the core may
33   send a message to the coordinating agent for that

23

1   service, requesting the module. After some brief

2   negotiation, the coordinating agent may send back a

3   request to install the new module. The core module

4   management accepts and downloads the software. After

5   updating the internal module database, it starts the new

6   module, which then docks with the IMCL, as described

7   above.

8

9   The process of updating a module and the handover between

10   the older and newer versions in illustrated in Figure 5.

11   With reference to Figure 5, a flowchart 800 of the module

12   updating process is shown. First, either a user specifies

13   802 a module, the core receives a message 804 specifying

14   a module to update, or the core determines 806 that a

15   module should be updated. The core reasons and decides

16   808 whether or not to update the module. If an update is

17   determined to be completed, the core calls 810 the IMCL

18   with the *getmodule* label and URI specifying the location

19   of the Java Archive file. If not, the updating process

20   ends 836. The IMCL then resolves 812 *updatemodule* label

21   to the ModuleManagement.ModuleUpdate method in the core

22   and the IMCL calls 814 the core's

23   ModuleManagement.ModuleGet method with the module name

24   and the URI. ModuleManagement calls 816 the module's

25   UpdateMe method and the UpdateMe method returns the

26   module state information, which is then stored 818 by

27   ModuleManagement. ModuleManagement downloads 820 the Java

28   Archive file from the URI. The .jar manifest file 822

29   specifies the Module class and the Module class 824

30   includes the DockMe method. With this information, the

31   ModuleManagement instantiates 826 the Module class and

32   calls 828 the DockMe method with the stored state

33   information. The DockMe method may then register 830

24

1 labels with the IMCL and initialise 832 the BAMM handler

2 before the Module Management calls 834 the UnDockMe

3 method on the old module and unloads the class then ends

4 the process 836.

5

6 The core's module management also handles more complex

7 situations, in which a new version of an existing module

8 is installed. The handover between the modules requires

9 careful timing to ensure service to the rest of the agent

10 are not disrupted. When a new version of a module is to

11 be docked, the core module management calls the old

12 version's update method, and, at an appropriate moment

13 (at a break between discrete tasks that the module is

14 working on) the module returns a representation of its

15 current state.

16

17 Then, as part of the new module's docking method, it

18 accepts the state of the previous version's data, so that

19 it can pick up from where the previous module left off.

20

21 During the handover between versions of a module, the

22 IMCL queues calls to the modules' labels, awaiting the

23 docking of the new version.

24

25 Some of the functionality described herein is collected

26 together in the core. Rather than hardwire a distinction

27 between core and other modules, the core is instead

28 implemented in just the same way as any other module.

29 This means that calls on core functionality can exploit

30 the robustness of the label-based, IMCL-mediated method
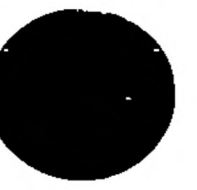
31 calling.

32

25

1   It also means that core itself can be updated and docked

2   through just the same process as any other module (so the

3   activity of the module management component in the old

4   core is interrupted and then taken up by the activity of

5   the module management component in the new core). This

6   means that new core functionality can be deployed

7   dynamically, without other modules needing to know ahead

8   of time all that might be included.

9

10   Further modifications and improvements may be added

11   without departing from the scope of the invention herein
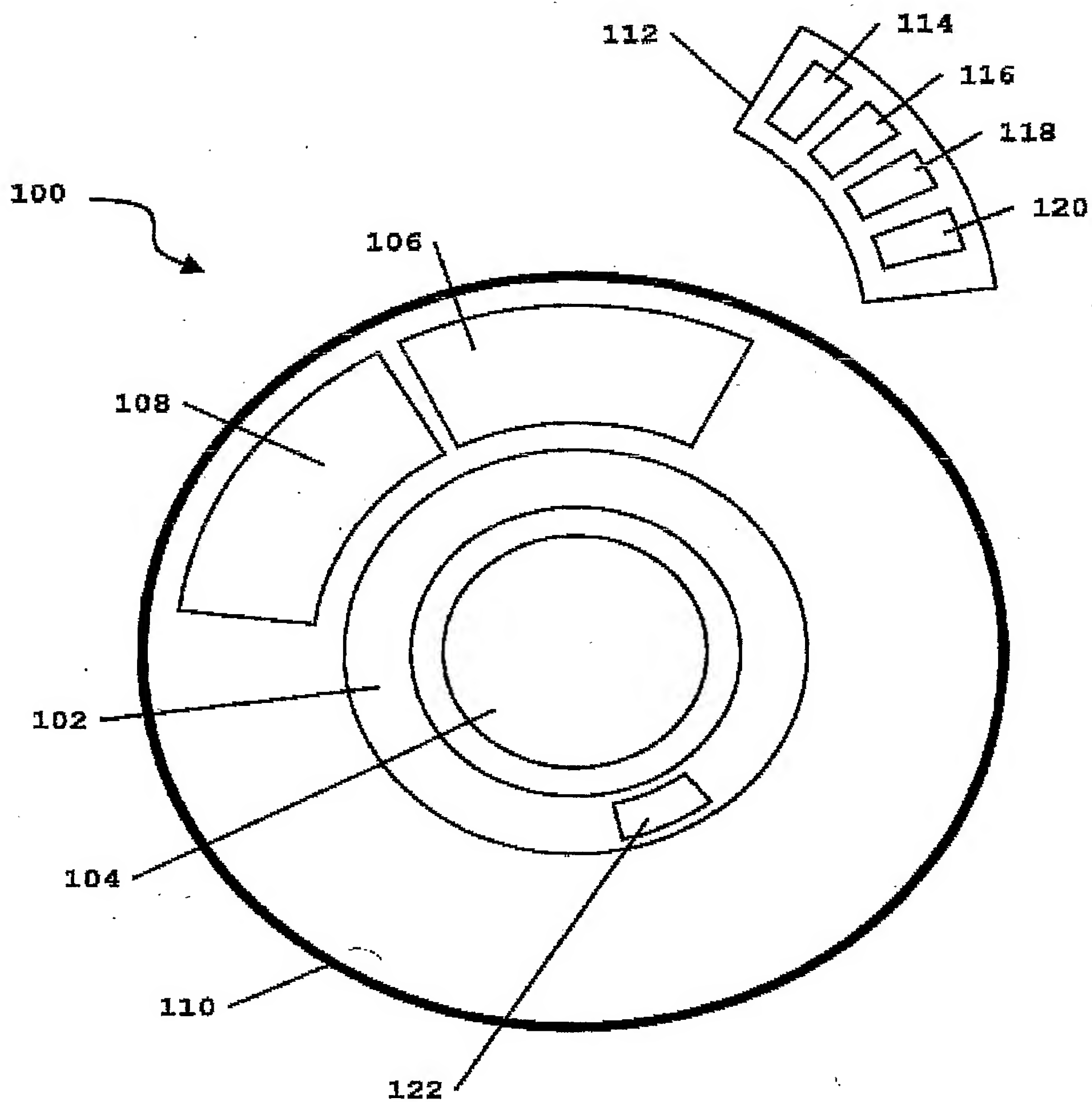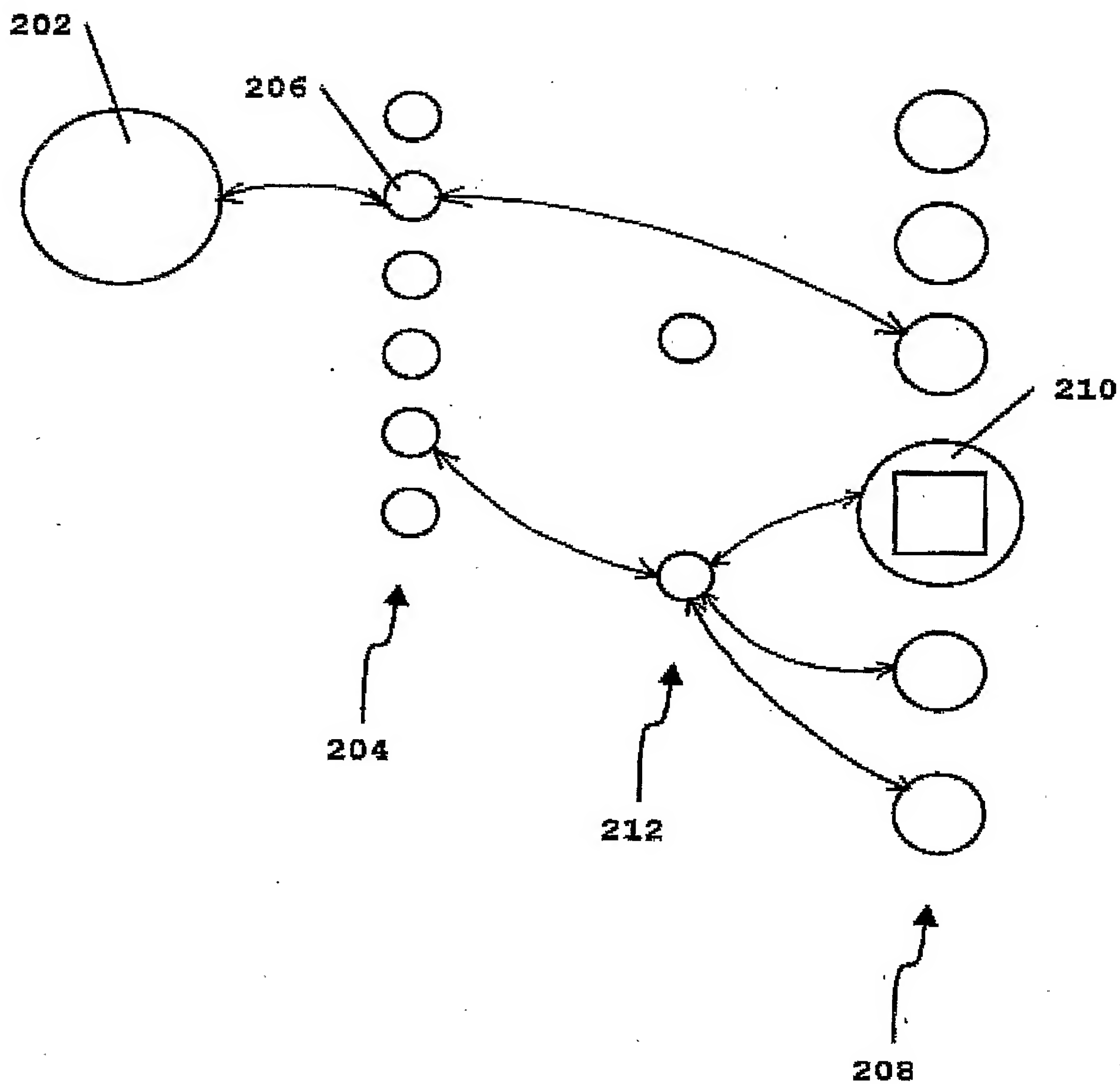
12   described.

13

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Fig. 1

Fig. 2

Module makes call to label L — 310

IMCL looks up L in label table — 312

Is L present? — 314

Yes

No

Return 'not found' — 316

Does L have multiple resolutions? — 318

Yes

No

IMCL selects highest priority resolution — 320

IMCL calls method described in resolution — 322
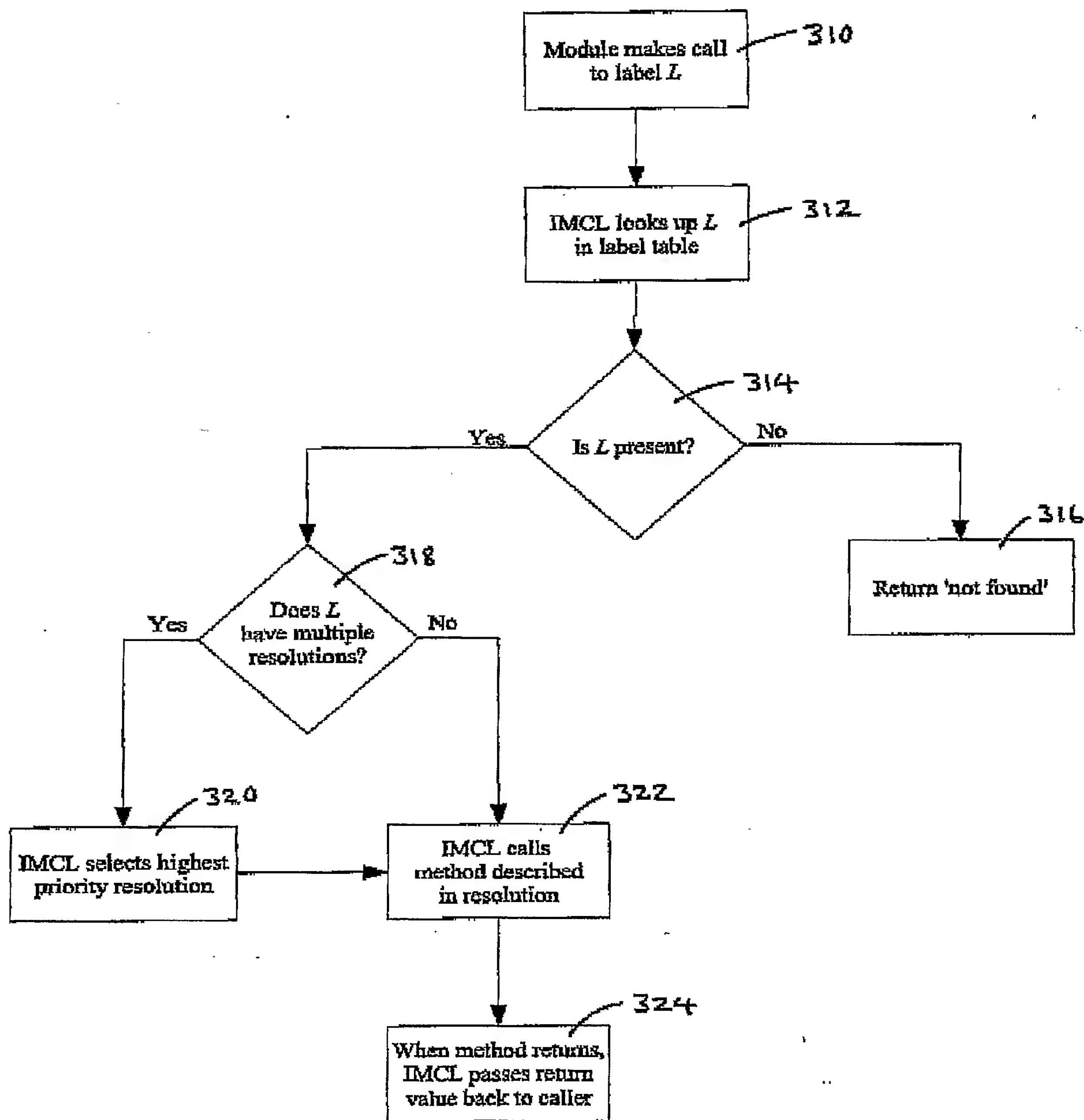
When method returns, IMCL passes return value back to caller — 324

Fig. 3

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Figure 4

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Figure 5